CVMS Training Session for Providers

What's New in Release 4.1

Version 1

February 16, 2021

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

Meet your training team for today

Name: Tabitha McKelvy

Title: Training Contractor

Why I am excited about CVMS:

The CVMS Portal has a direct impact on how we can keep our communities safe and the people we love healthy.

Today's expectations

Learn more about CVMS and what is new is new with Release 4.1

Ask any questions you may have about CVMS or the updates made over the weekend

Learn more about the Help Desk, Training Resources, and additional available resources.

Please note that this session is *not* intended to be a click-through training session. We will have sessions throughout the week that will provide click-through training on the CVMS Provider Portal.

Agenda

Welcome and What to Expect Today

CVMS Overview

What is New in Release 4.1 *- All Profiles*

What is New in Release 4.1 - *Location Manager Profile Only*

Upcoming Training Sessions and Available Support Resources

Q&A

How to participate today

- Session is being recorded

- Mute your line unless you are addressing the group

- Interactive session

- Utilize Chat box to ask questions – we will address during our question breaks!

- We will pause for questions at the conclusion of each demonstration

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

CVMS Overview

5 min

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

What is CVMS?

What is CVMS?

The COVID-19 Vaccine Management System (CVMS) is a secure, cloud-based **vaccine management solution for COVID-19 that enables vaccine management and data sharing across providers, hospitals, agencies, and local, state, and federal governments on one common platform.**

In CVMS, you can:

• **Enroll in the COVID-19 Vaccine Program and upload employees so they can register for COVID-19 vaccination**

• **Manage COVID-19 vaccine inventory**

• **Track COVID-19 vaccine administration**

In future CVMS releases, providers will also be able to schedule clinics.

Who will use CVMS?

1. NC State officials **will enroll providers and verify provider eligibility** along with verifying site readiness.

2. **Providers will verify recipient eligibility, log dosage administration, and track frequency** and timing of additional dosages.

3. **Recipients** will also have a portal where they can do things like complete their health questionnaire and view their proof of vaccine.

4. And lastly, some *non healthcare* employers and organizations will also have a portal that they will use for uploading for eligible employees on their staff or individuals who will need to get vaccinated.

Why CVMS?

CVMS provides a flexible approach for managing, delivering, and administering vaccine programs.

It consolidates multiple legacy, siloed systems into an integrated platform with configurable modules**. This allows for quicker updates to the system in order to meet business needs**. In addition, **built-in automation features mean less time on routine tasks** and more time on high-value activities.

Two user profiles on CVMS Provider Portal
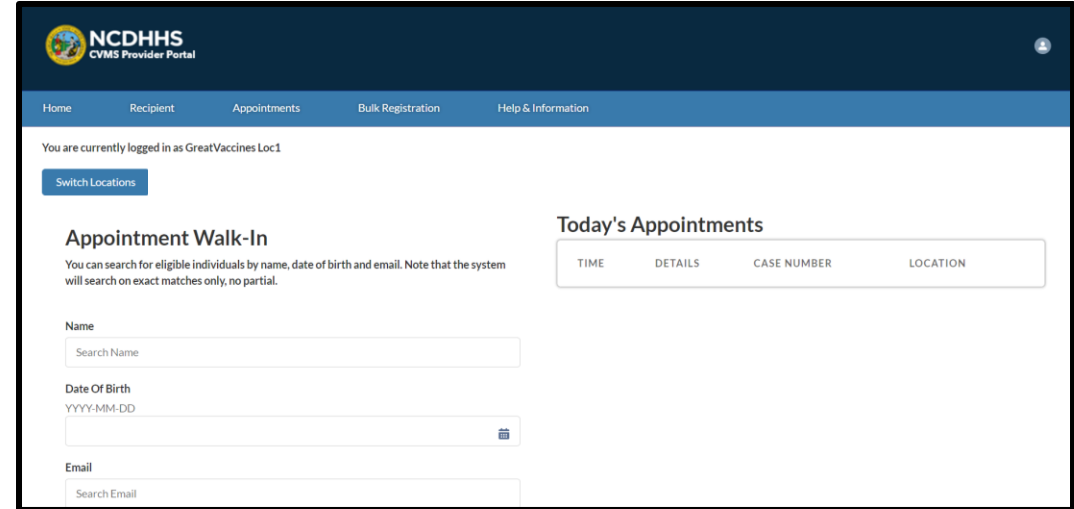
Healthcare Provider

- Check-In Recipient

- Verify Recipient's Identity & Eligibility

- Log Vaccine Administration

- On-site Recipient Registration

Healthcare Location Manager
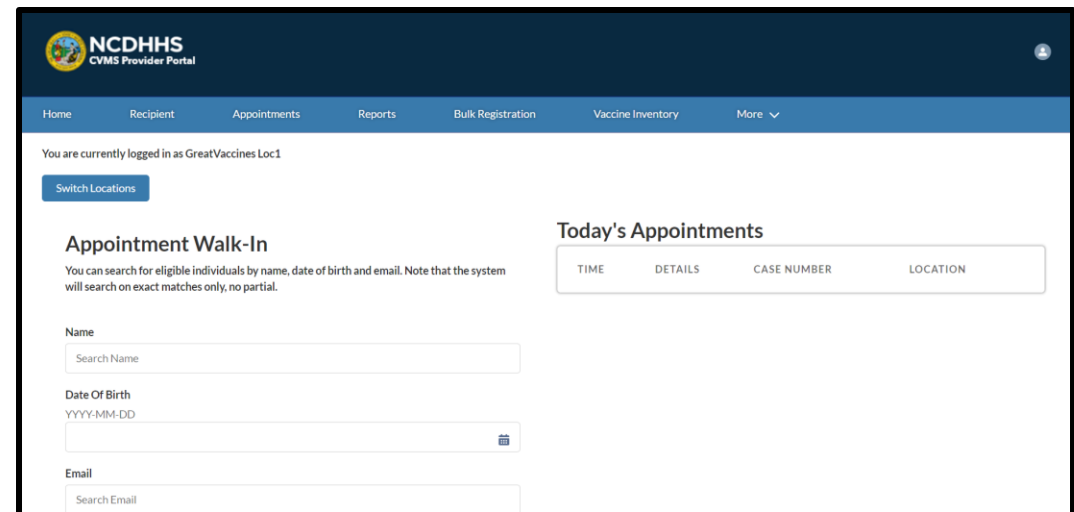
- View, Receive, and Add Inventory

- View Order and Shipment details

- View and Update Vaccine Inventory Levels

- Manage Location Information

- Review Reports

- *Healthcare Provider activities*

Healthcare Provider Profile Top Navigation Bar

Healthcare Location Manager Profile Top Navigation Bar

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

8

What is New in Release 4.1
All Profiles

30 min

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

Overview of what's new in Release 4.1 for CVMS Provider Portal

- Increased security levels using Shield Field level encryption to adhere to the State of North Carolina requirements

- New help text for the 'On Behalf of (Clinician)' field during the vaccine administration process

- Multi-location Users Only: Location assignments for the log-in session will not be defaulted; you will need to use the 'Switch Location' button before proceeding with Portal activities

> *Location Manager specific updates for Release 4.1 will be showcased immediately following the updates relevant to all user profiles. Stay tuned!*

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

Help text for the 'On Behalf of (Clinician)' field during the vaccine admin process

Placing cursor on the info icon will display new Help Text to indicate that it is **OPTIONAL** to 'Select Vaccine Administrator**'** and only required if you are entering data **ON BEHALF OF SOMEONE ELSE.**

Multi-location Users Only: Location assignments for the session will not be defaulted

If you are a user operating from **MULTIPLE LOCATIONS** within your organization, you will now need to **SELECT A LOCATION** within your organization before proceeding with Portal activities

In this module, we reviewed:

- **Updates to the CVMS Provider Portal for all user profiles**

Do you have any questions?

What is New in Release 4.1
Location Manager Profile Only

40 min

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

Overview of what's new in Release 4.1 for CVMS Provider Portal

Additional functionality for users with a Healthcare Location Manager Profile:

- Introduction to self-service organization management directly in the Provider Portal, enabling users to search, create, and manage organizations identified to use the CVMS Organization Portal

  - **PLEASE NOTE:** Do not use the Organization Management tab to upload any organizations until you receive the proper guidance from NC DHHS.

- Introduction to self-service account management directly in the Provider Portal, enabling users to add or remove other users and manage location assignments for existing users

- Ability to submit an inventory transfer or redistribution request directly in the CVMS Provider Portal

- Ability to record "Insufficient Quantity" events if less than standard doses are obtained in a vial

- Ability to tag vaccine inventory as a 1st or 2nd dose to easily identify if an inventory was intended for first doses, second doses, or both

Introduction to self-service organization management directly in the Provider Portal

The new **ORGANIZATION MANAGEMENT TAB** will allow Location Managers to search, create, and manage organizations identified to use the CVMS Organization Portal.

PLEASE NOTE: Do not use the Organization Management tab to upload any organizations until you receive the proper guidance from NC DHHS.

Additional information and training opportunities will be available in the near future.
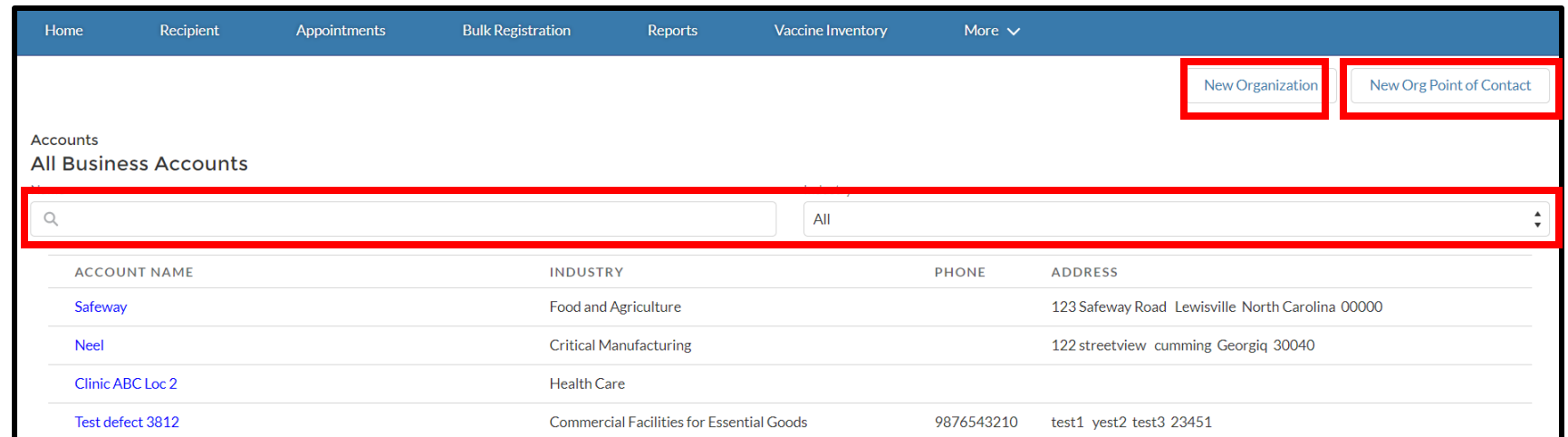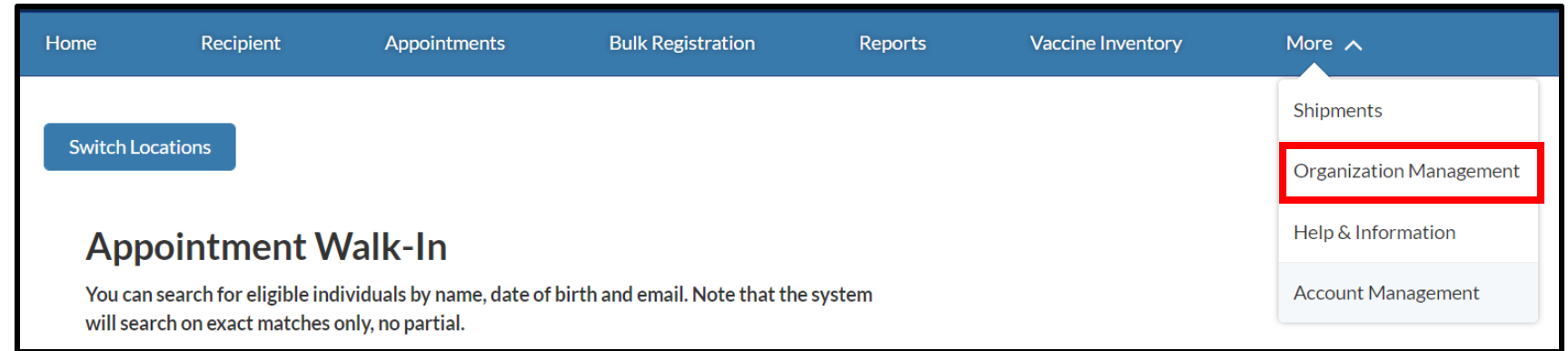
Introduction to self-service account management directly in the Provider Portal

The new **ACCOUNT MANAGEMENT TAB** will allow users to add or remove users within their location from the Provider Portal and manage location assignments for existing users directly in the CVMS Provider Portal.

Introduction to self-service account management directly in the Provider Portal

Populate and save the **HCP PORTAL CONTACT** record. Be sure to check that the user does not have a CVMS Provider Portal account before creating a new one.

Introduction to self-service account management directly in the Provider Portal

After clicking **SAVE**, an **AUTOMATIC EMAIL WILL BE SENT TO THE CONTACT** inviting them to sign into their CVMS Provider Portal account using their NCID username and password to start completing their activities.

Hi Lisa,

Welcome to the COVID-19 Vaccine Management System (CVMS).

To get started, go to https://uat3-ncdhhs.cs82.force.com/VaccineProviders/ you will be redirected to the NCID sign on page, enter your NCID and password and select NCID Login. You will then be automatically logged into the CVMS Provider Portal.

Need support? Submit your question to the help desk here: https://ncgov.servicenowservices.com/csm_vaccine

Thank you,
NC Department of Health and Human Services

NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

Introduction to self-service account management directly in the Provider Portal

After clicking **SAVE**, you will be able to **SEARCH** using the Contact's name or NCID and view their account information in the Account Management tab.

Introduction to self-service account management directly in the Provider Portal

As a Healthcare Location Manager, you will be able to **ADD ADDITIONAL LOCATIONS** to the user's profile if needed.

Introduction to self-service account management directly in the Provider Portal

As a Healthcare Location Manager, you will be able to **ADD ADDITIONAL LOCATIONS** to the user's profile if needed.

Introduction to self-service account management directly in the Provider Portal

As a Healthcare Location Manager, you will also be able to **EDIT** contact information, **VIEW** contact history, and **DEACTIVATE** the user's profile if needed.

Ability to submit an inventory transfer or redistribution request in the Provider Portal

Selecting the **REQUEST TRANSFER / REDISTRIBUTION** button will not initiate a transfer request but will instead provide a brief overview of the instructions. Select **NEW** to begin the transfer or redistribution request.

Ability to submit an inventory transfer or redistribution request in the Provider Portal

A pop-up window will appear titled **NEW ORDER: TRANSFER OR REDISTRIBUTION.** The doses transferred **MUST BE LESS THAN** the doses currently available on the selected Vaccine Inventory record.

Ability to submit an inventory transfer or redistribution request in the Provider Portal

If the status shows as **SUBMITTED** or **PROCESSING**, that indicates the transfer is pending approval. If the status appears as **TRANSFER IN TRANSIT**, that indicates the transfer has been approved by NCDHHS.

Ability to record "Insufficient Quantity" if less than standard doses are obtained

COVID-19 Insufficient Quantity events include anytime **LESS THAN THE CDC STANDARD** doses are obtained from a vial for that specific vaccine manufacturer.

Ability to record "Insufficient Quantity" if less than standard doses are obtained

After you fill in the required fields and click **NEXT**, a **SUCCESS SCREEN** will appear notifying you that the Insufficient Quantity Event has been created.

Ability to tag vaccine inventory as a 1st or 2nd dose

Tag a vaccine inventory to easily identify if the inventory was intended for first doses, second doses, or both. It is recommended to tag new shipment as either a first or second dose, instead of both where possible.

Ability to tag shipments as a 1st or 2nd dose

Tag a vaccine inventory to easily identify if the inventory was intended for first doses, second doses, or both. It is recommended to tag new shipment as either a first or second dose, instead of both where possible.

In this module, we reviewed:

- **Updates to the CVMS Provider Portal for Healthcare Location Managers**

Do you have any questions?

Upcoming Training Sessions and Available Support Resources

5 min

This Week's Training Schedule

TOPIC	DATE	TIME
What is new in Release 4.1 of CVMS	16-Feb	9:00 AM
CVMS Provider Portal 101	16-Feb	11:00 AM
CVMS Provider Portal 202 - Location Manager only	16-Feb	2:00 PM
Provider Enrollment	17-Feb	10:00 AM
CVMS Provider Portal 201 - Location Manager only	17-Feb	2:00 PM
CVMS Provider Portal 202 - Location Manager only	18-Feb	10:00 AM
CVMS Provider Portal 101	18-Feb	2:00 PM
CVMS Provider Portal 201 - Location Manager only	19-Feb	10:00 AM
Provider Enrollment	19-Feb	2:00 PM

CVMS Provider Portal Training Descriptions:

CVMS Provider Portal 101 - Recipient Registration and Vaccine Administration

CVMS Provider Portal 201 - Location Manager Profile only - Manage Vaccine Inventory

CVMS Provider Portal 202 - Location Manager only - Manage Users, Upload Recipients, View Reports

Additional Resources

NCDHHS provides a range of tools and methods for CVMS and vaccine training including access to the CVMS Help Desk Portal, Live Training Sessions, User Guides, and personalized Communications.

CVMS Help Desk Portal: CVMS Help Desk Portal will contain a number of Knowledge Articles and FAQs that will provide information such as self-help, troubleshooting and task resolution.
Access CVMS Help Desk Portal: at:
https://ncgov.servicenowservices.com/csm_vaccine
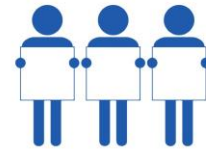
Live Training: Live training will include step-by-step demonstrations of key tasks in CVMS, with opportunities to ask questions and do "replays" to take a closer look with the trainers.
Access live training information at:
https://immunize.nc.gov/providers/covid-19training.htm

Communications: CVMS enhancement updates, training event invitations, and information about new user guides and video demonstrations.
Be on the look out for email from: vaccineinfo

User Guides: Step-by-step instructional guides with screenshots designed to teach users how to CVMS. Screens are annotated with helpful tips and tricks.
Access training at:
https://immunize.nc.gov/providers/covid-19training.htm

Thank You!